

## SECTION VI

### PROPOSAL EVALUATION

#### A. INTRODUCTION

Evaluation of this proposal/bid will be on a value-effective basis. During the evaluation process, both non-cost and cost criteria will be uniformly applied to all bids to identify the best long-term, overall value to the state rather than simply the lowest initial acquisition cost. All non-cost evaluation factors will be scored first by the state's project team and made public. Only those bidders deemed responsive will have their cost proposals opened and evaluated.

Prior to the value-effective evaluation of non-cost and cost factors, the Administrative Requirements and proposed contract language will be examined. Proposals that contain non-approved contract language will be deemed non-responsive and disqualified from any further contract award consideration. If any of these requirements is found to be lacking or incomplete, the proposal/bid may be deemed non-responsive to the overall requirements of this RFP.

#### B. RECEIPT

Upon receipt, each proposal will be marked with the date and time and verified that it is properly sealed. Proposals will remain sealed until the designated time for opening.

#### C. DRAFT BID EVALUATION PROCESS

Each Draft Bid will be opened at the time designated for receipt and reviewed for administrative or clerical errors and inconsistencies that, if contained in the Final Bid, may cause the proposal to be rejected. If such errors are found that can be corrected without overhauling the proposal, the bidder will be notified and given an opportunity to correct the indicated errors before Final Bid submittal. It is not the intent of the state to review the Draft Bid at this time for total responsiveness to all RFP requirements.

NOTE: This is not an opportunity to make major changes to the proposal, but only to correct those errors that could cause the Final Bid to be deemed non-responsive on a technicality. During this review, the state will not be in a position to determine if a defect could be material and cause the Final Bid to be rejected. The state makes no warranty that all such errors will be identified during the review of the Draft Bid or that such errors remaining in the Final Bid will not cause the proposal to be rejected.

**Do not submit any pricing information with the Draft Bid.** Dollar figures are to be replaced by XXXXX's or blanks. Submission of monetary information with the Draft

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Bid may be cause for rejecting the proposal/bid and disqualifying the bidder from participating in the RFP process.

**D. CONFIDENTIAL DISCUSSIONS**

If confidential discussions of Draft Bids are needed in the opinion of the state, a schedule will be prepared. Each bidder will be invited to meet with the Procurement Division Official, Telecommunications Division Contact, and any other appropriate project team member(s) to discuss defects found by the state and any items that require clarification. Prior to the scheduled discussions, the state will prepare a discussion agenda itemizing the points to be covered. At the conclusion of the discussion, the state will prepare a discussion memorandum documenting the clarified items and agreements as to how the bidder proposes to correct the noted defects.

**E. FINAL BID EVALUATION PROCESS**

1. **Bid Opening:** There will be no formal opening at the time of proposal/bid receipt due to the fact that the state will utilize an evaluation method for this RFP where separately sealed cost information will be opened subsequent to the evaluation of the non-cost portions of the bid. The names of the bidders will be public information after the Final Bid is received.

All proposals received by the time and date specified in **Section I, KEY ACTION DATES**, will be opened. Cost data will be kept in a locked area until all non-cost aspects of the proposals have been evaluated. The proposals will be checked for the presence of the required information in conformance with the requirements of this RFP. Absence of required information may prompt the state to deem the proposal non-responsive and may cause it to be rejected.

2. **Validation of Administrative Requirements:** The state will check the bidder's Volume 1, Section 2 in detail to determine its compliance to **Section VII, ADMINISTRATIVE REQUIREMENTS**. If a proposal fails to meet any administrative requirement, the state will determine if the deviation is material as defined in **Section II**. A material deviation will cause rejection of the proposal. An immaterial deviation will be examined to determine if the deviation will be accepted. If accepted, the proposal will be processed as if no deviation were present.
3. **Validation of Acceptable Contract Language:** The state will check the bidder's Volume 2 in detail to determine its compliance to **APPENDICES A and B**. If a bidder fails to submit acceptable contract language, the state will determine if the deviation is material as defined in **Section II**. A material deviation will cause rejection of the proposal. An immaterial deviation will be

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examined to determine if the deviation will be accepted. If accepted, the proposal will be processed as if no deviation were present.

4. **Non-Cost Evaluation:** After validation of the Administrative Requirements and the contract, the evaluation team will check the bidder's Volume 1, Section 3 in detail to determine its compliance to **Section VIII, TECHNICAL REQUIREMENTS**. For each telecommunications consulting category, the state will determine non-cost points in the areas of overall experience, client references, client satisfaction, and consultant resumes as described in **Section VI.F** below.
5. **Announcement of Non-Cost Points:** Upon completion of the evaluation of all non-cost portions of the proposals, the evaluation team will compile each participating bidder's non-cost points. Scores will be provided for those bidders who have met the minimum technical requirements by receiving at least a minimum of thirty-seven (37) non-cost points in any individual proposed telecommunications consulting category.
6. **Public Cost Opening:** Following publication of the non-cost scores, the public cost opening will be scheduled. All participating bidders will be notified of the date and time. Volume 3 for all responsive bidders will be unsealed and **Exhibit IX-A** read to all persons present at the cost opening.
7. **Cost Evaluation:** The evaluation team will convene to complete cost evaluation. The evaluation team will confirm that the numbers provided on the cost worksheets are consistent between **Section IX, COST** and the DVBE cost exhibits. Cost worksheets will be verified for mathematical accuracy. Errors will be resolved in accordance with **Section II.C.7.d, Errors in the Proposal**. After verification of costs, points will be assigned, as described in **Section VI.F** below.
8. **Selection:** Cost points will be added to non-cost points to determine a total score for each responsive participating bidder for each telecommunications consulting category. Award of a contract(s), if made for each telecommunications consulting category, will be to a bidder(s) whose proposal(s) is responsive to the RFP requirements. The state reserves the right at any time to reject any or all proposals. The state also reserves the right not to award a contract.

**F. FINAL BID SCORED REQUIREMENTS**

The maximum score for this RFP is 100% for each telecommunications consulting category. Of the total, 70% will be based upon non-cost criteria. The remaining 30% will be based upon the cost factors.

To evaluate the responses to this RFP, a multi-member project team will be used. Each member of the team will read and evaluate each proposal. The team will meet to collectively review and discuss the proposals.

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The methodology that will be used to award points for the Final Bid in these categories is described below.

<b>Category</b>	<b>Summary of Evaluation Criteria</b>	<b>Total Possible Score</b>
Overall Responsiveness of RFP Response	<ul style="list-style-type: none"><li>• Proposal received by the date and time required</li><li>• Required elements addressed in proposal</li><li>• No exceptions to any administrative requirement.</li><li>• Only approved contract language included and signed as required.</li></ul> Note: the proposal will be rejected if any of the required elements are missing,	Pass/Fail
Bidder's Financial Responsibility	<ul style="list-style-type: none"><li>• Documented Financial information</li></ul>	Pass/Fail
Client References	<ul style="list-style-type: none"><li>• Relevant experience documented</li></ul>	25%
Client Satisfaction	<ul style="list-style-type: none"><li>• Client satisfaction rating</li></ul>	20%
Consultant Resumes	<ul style="list-style-type: none"><li>• Meets minimum Relevant experience required<ul style="list-style-type: none"><li>• Experience exceeds minimum requirements</li></ul></li></ul>	25%
Proposed Costs	<ul style="list-style-type: none"><li>• All cost associated with bidder's proposal</li></ul>	30%
	<b>MAXIMUM POSSIBLE SCORE</b>	<b>100%</b>

**1. Non-Cost Scoring**

A responsive bidder will be awarded a proposal score based on the following criteria:

- a) Overall Responsiveness - Scoring = Pass or Fail. Only proposals that are received on time and are responsive to all requirements will be given award consideration. Proposals that are late or that are non-responsive will be rejected and given no further award consideration.

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- b) Bidder's Financial Responsibility - Scoring = Pass or Fail. Bidder must document that their company's asset-to-liability ratio is .95 or greater based on the Dunn & Bradstreet Industry Index for the Telecommunications Consulting Services.
- c) Client References - Maximum Score = 25%. Bidders may provide up to five (5) client references. Preference will be given to relevant company experience gained from State of California = 2.5%, then other relevant experience gained from other states and federal projects = 2.0%, then local governments = 1.5% and then relevant private sector experiences = 1.0%. An additional 2.5% will be given for project relevance to the specific category.
- d) Client Satisfaction - Maximum Scoring = 20%. The bidder's client reference score will be derived from the average of all of the client reference satisfaction ratings (numerical averaging). Bidders will receive points based on the number of customer reference points received using **EXHIBIT VI A** for whom they have performed consulting services.
- e) Consultant Resumes - Maximum Scoring = 25%. The State would like to minimize the number of Consultant Resumes for proposed categories and labor classifications. A maximum of four (4) resumes will be considered for each category. The highest qualified for each category should be submitted for consideration. Resumes of individuals offered for specific consultant categories and labor classifications will be scored as follows:
  - (a) Qualified personnel exceeding the minimum specified per category will earn up to 5%, + 1 = 2.5% and + 2 = 5%.
  - (b) Documented and verified technical expertise equivalent to 50% of the specified technical expertise will earn 2.5% and 2.5% additional will be earned for technical expertise exceeding 75% of the specified requirements.
  - (c) Documented and verified functional capabilities equivalent to 50% of the specified capability will earn 2.5% and 2.5% additional will be earned for functional capabilities that exceed 75% of the specified requirements.

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- (d) Documented and verified experience equivalent to a majority of specified experiences will earn 5% and 5% additional will be earned for experience exceeding a majority of the required experience. Each proposed resume will have their references verified. Resumes not meeting the 50% technical expertise, functional capabilities or experience will earn zero percents. Each consultant proposed must be listed on **EXHIBIT VI B** by name, category (s) for which qualifying, firm and cross-referenced to the appropriate resume. **EXHIBIT VI C** is to be completed by bidder's to tally client reference forms and consultant resumes for all categories.

The State recommends you structure your resumes to fit the format to include technical expertise, functional capabilities, and experience. Be sure to include project reference names and phone numbers for verification. Resume information that cannot be verified will not be considered.

All documentation for each category should be grouped together. Technical expertise, functional capabilities and experience for each resource submitted should be tailored to meet the requirements for each category.

**2. Cost Scoring**

The state will award points for lowest cost over the total evaluation period of 9 years (7+1+1). The bidder proposing the lowest cost will be awarded the maximum number of points. A proportionate score will be awarded to other bidders based on their relative ranking to the lowest bidder, per category.

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Cost Scoring Example:

<b>Bidder</b>	<b>Evaluated Cost</b>	<b>Lowest Evaluated Cost</b>	<b>Cost Scoring Factor</b>	<b>Adjusted Cost Score</b>
A	\$1,800,000	\$1,600,000	.889	27
B	\$2,000,000	\$1,600,000	.800	24
C	\$1,600,000	\$1,600,000	1.000	30

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<b>MAXIMUM SCORE AVAILABLE FOR EACH TELECOMMUNICATIONS CONSULTING CATEGORY</b>	<b>100%</b>
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**Exhibit VI-A**

**CUSTOMER REFERENCE  
FORM**

**BIDDER'S NAME:** \_\_\_\_\_

NOTE TO CUSTOMER REFERENCE: THE BIDDER ON THIS RFQ IS GIVING YOU THIS CUSTOMER REFERENCE FORM TO VERIFY YOUR OVERALL SATISFACTION OF THEIR PERFORMANCE.

1. Customer Reference Company  
Name: \_\_\_\_\_

2. Customer Reference Contact  
Person: \_\_\_\_\_

3. Telephone Number: ( \_\_\_\_\_ ) \_\_\_\_\_ E-mail  
address: \_\_\_\_\_

4. Customer Reference Contact  
Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Date of Order: \_\_\_\_\_

6. What telecommunications consulting services were  
provided: \_\_\_\_\_

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7. Total Contract Amount \$ \_\_\_\_\_

8. Customer Satisfaction Rating:

On a scale from two (2) to twenty (20) with twenty being the highest rating, how would you rate the bidder's overall performance in completing the contract requirements. (Please indicate one number only to rate the Bidder's performance)

a. How would you rate their effectiveness; deliverables  
provided as specified?

2\_\_\_\_4\_\_\_\_6\_\_\_\_8\_\_\_\_10\_\_\_\_12\_\_\_\_14\_\_\_\_16\_\_\_\_18\_\_\_\_20\_\_\_\_  
\_\_\_\_\_

b. How would you rate their time management; tasks completed as  
scheduled?

2\_\_\_\_4\_\_\_\_6\_\_\_\_8\_\_\_\_10\_\_\_\_12\_\_\_\_14\_\_\_\_16\_\_\_\_18\_\_\_\_20\_\_\_\_  
\_\_\_\_\_



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c. How would you rate their cost-effectiveness; services provided within proposed budget?

2\_\_\_\_4\_\_\_\_6\_\_\_\_8\_\_\_\_10\_\_\_\_12\_\_\_\_14\_\_\_\_16\_\_\_\_18\_\_\_\_20\_\_\_\_

CERTIFICATION: I hereby certify that I have made a diligent effort to ascertain the facts with regard to the representations made herein and, to the best of my knowledge and belief all information is accurate.

9. Customer Reference Contact Person

Signature:\_\_\_\_\_

10. Printed Title of Person

Signing:\_\_\_\_\_

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## Exhibit VI-B

## ROSTER OF CONSULTANTS - BY CATEGORY

[illegible]

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**Exhibit VI-C**

**TALLY OF CLIENT REFERENCE FORMS & CONSULTANT RESUMES - ALL CATEGORIES**

BIDDER'S NAME: _____										
Category y Number	Category Proposed by Bidder? (circle one)	Number of Client Reference Forms Submitted by Category	Cumulative Total of Customer Satisfaction Ratings from All Client Reference Forms Submitted by Category	Number of Consultant Resumes Submitted by Labor Classification						
				Manager	Principal Engineer	Principal Analyst	Senior Engineer	Senior Analyst	Engineer	Analyst
1.	Yes   No									
2.	Yes   No									
3.	Yes   No									
4.	Yes   No									
5.	Yes   No									
6.	Yes   No									
7.	Yes   No									
8.	Yes   No									
9.	Yes   No									
10.	Yes   No									
11.	Yes   No									
12.	Yes   No									
13.	Yes   No									
14.	Yes   No									
15.	Yes   No									
16.	Yes   No									
17.	Yes   No									
18.	Yes   No									